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A CAHNERS PUBLICATION

DATAMATION®

FOR CORPORATE COMPUTING PROFESSIONALS WORLDWIDE

AUGUST 15, 1992

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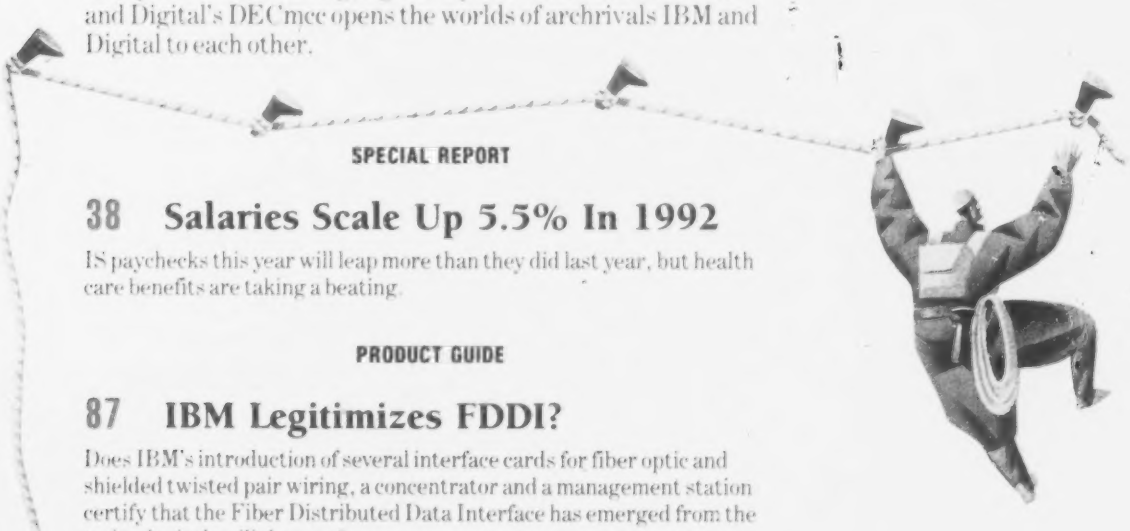

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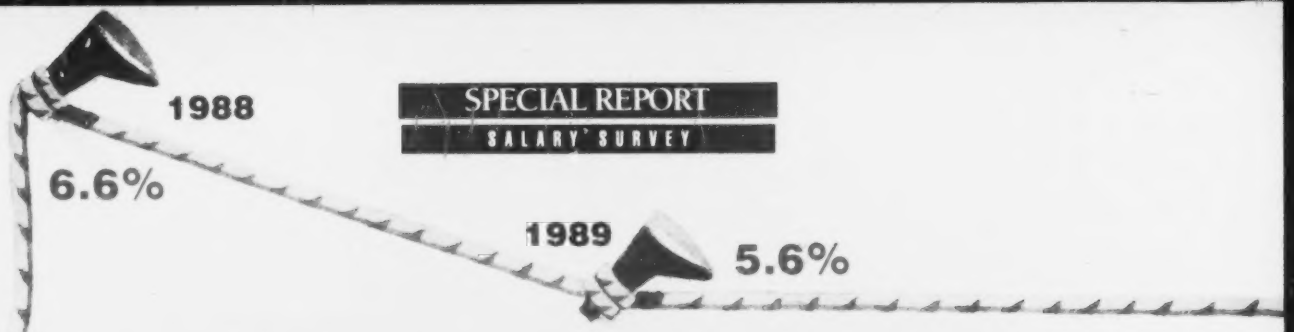


SPECIAL REPORT
SALARY SURVEY

Salaries Scale Up 5.5% In 1992

IS paychecks this year will leap more than they did last year, but health care benefits are taking a beating.

BY KATE COLBORN

The economy may be slowly climbing out of the abyss, but your paycheck probably won't grow as much as you wish it would this year. Respondents to DATAMATION's annual salary survey say their companies plan merit increases in 1992 that average just over 5.5%. That's better than last year's predicted 4.7% raise, but not up to the 6%+ increases of the good old 1980s. With inflation this year running at 4.2%, according to DATAMATION sister organization Cahners Economics, IS professionals—like the rest of the work force—will stay a little ahead of the game, but not by as large a margin as was common in the last decade.

The moderate salary increases reflect a relatively cool hiring scene. Most survey respondents expect their IS staffing levels to be stable this year. More than 74% of shops will maintain current staffing levels or will add personnel, according to the 1,750 respondents to the 1992 DATAMATION budget survey conducted earlier this year (See "The Hot Applications of 1992," May 1, 1992, p. 34). There may even be cause for optimism in certain industrial sectors, as the economy begins to rebound. Securities firms like Charles Schwab & Co. Inc. of San Francisco; robust banks like Banc One Corp. of Columbus, Ohio; and healthy biomedical companies like Ciba Corning Diagnostics of Medfield, Mass., report steady growth of their IS staffs. "Our IS group has been growing along with the company," says Cliff Hubbard, Ciba Corning director of information services. Hubbard's 85-person domestic IS organization will grow to 100 or more this year, he adds.

The largest salary increases will be received by IS staffers in the Dallas/Ft. Worth and Houston areas. They're expected to bring home a 6% raise this year, as former Rust Belt industries continue to migrate to the Sun Belt. For example, Exxon Corp. earlier this year consolidated its U.S. data centers into a megacenter in Dallas. At the other extreme, ISers in the Los Angeles area, subjected to the tribulations of the post cold war aerospace industry, will see, on average, no more than 4.7% increases. The aerospace industry there has lost more than 20% of its jobs since 1989, and almost half of the loss occurred last year, according to the California Employment Development Department in Sacramento. An increased labor pool means that companies need not offer top dollar to keep people. Pacific Bell Co. in San Francisco offered an average raise of 4% in each of the last two years, says Jack Hancock, executive vice president of technology and product support.

Weak minicomputer companies in the Boston area have also been downsizing, and their former employees offer local IS managers a smorgasbord of choices when they have positions to fill. "There are good people on the street locally," observes Hubbard of Ciba Corning. "A lot of companies cut their C team people years ago, and now they're cutting the B team members." Ciba's raise pool this year is less than 5.5%, he says; the overall average for the Boston area is 5.1%.

The woes of the defense/aerospace industry—and tough times at U.S. automobile makers—are also reflected in the modest raises expected in those industries. Companies in the transportation business expect to give among the smallest raises of any industry sector, 4.6%, in 1992. In contrast, Data Processing services companies—including many consulting firms—top the average salary rise by

Raises Bounce Back

The average 5.5% hike in salaries for 1992 will beat the inflation rate this year, but lags behind the increases of the mid-1980s.

Source: DATAMATION 1992 Salary Survey

more than a percentage point, predicting raises of 6.7%.

Despite the layoffs, there are still IS workers in short supply. Still attracting salary premiums, signing bonuses and other lucre are OS/2 developers, LAN managers and code writers knowledgeable in object-oriented programming. Buffalo-based systems integrator Computer Task Group Inc. has more openings for consultants with OS/2 PC operating system skills than for those with experience on the AS/400 midrange platform, according to Nina Rasmussen, Western regional staffing manager.

The move to a distributed architecture can produce jarring changes for users and IS departments alike. In situations where IS must help users adjust to radically different systems, companies are paying above average salaries for the combination of client/server and interpersonal skills. Banc One Services Corp., the Columbus-based data processor and systems developer for the nationwide bank-holding company, is actively recruiting professionals with the interpersonal skills to handle the transition to a new, distributed architecture at 1,300 branch offices. "They will need to be competent in the technologies we're using in our new systems and also very sensitive to relationships," says Bob Barrett, BOSC president and chief executive officer.

Systems analysts comfortable with business issues have been at a premium for years, and the recent layoffs and downsizing of corporate staffs have not yielded quite enough people to fill the vacuum. Ciba's Hubbard says that although the 11 application developers the company recently hired were attracted to the company at the salaries he predicted, newly hired individuals coming in at higher levels, such as forecasters and planners, who have business as well as systems experience, commanded salaries 15 to 20% higher than he anticipated.

Programmers experienced with computer-aided software-engineering tools and knowledgeable about distributed processing can also demand premium salaries this year. "We are competing creatively in the market for these people," says an official of a major midwestern financial institution. Signing bonuses and generous relocation packages are among the benefits available for IS professionals with the right stuff, she adds.

The MIS manager for a midwestern health care company complains that he can't persuade management that LAN managers deserve a salary premium over end-user support personnel. "Our existing salary structure can't attract the people we need," he laments. "LANs are new to the company and new to management, and I haven't been able to prove to them that they have a value." But corporate recruiter Scott Curd, of Houston-based construction and engineering firm Brown & Root Inc. reports that the company pays networking people 15 to 20% more than programmers with equivalent years of experience.

Better financial opportunities appear more likely at smaller companies. Firms with sales under $5 million expect a bigger than average jump in salaries this year than those with sales over $1 billion—a category that consists mostly of public companies under pressure from investors to control costs. Small company raises will average 7% this year; organizations with more than $6 billion in revenue will offer only 5.5%.

While, overall, salaries are headed upward, benefits are another story. The nation's medical bills have been increasing at an annual 10% rate since the late 1980s, according to the Health Care Financing Administration (HCFA) in Baltimore. As a percentage of pretax corporate profits, business expenditures for health care have increased from 8.4% in 1965 to over 50% in 1989, according to the HCFA. General Motors Corp.'s health care bill exceeded $3 billion in 1990, after rising about 12.6% per year since 1965. Its health care costs are expected to rise 15% per year for the next several years, according to a GM official.

So it may be shocking, but not surprising, that 35% of the respondents to DATAMATION's survey reported a decrease in health insurance benefits.

Which Sectors Are Hot...

The sectors that are giving the largest raises this year:

DP Services	6.67%
Other Industries	5.95%
Nonbanking Financial Services	5.78%

And Which Are Not

Transportation	4.63%
Banking	4.79%
Manufacturing/Industrial Goods	5.21%

Source: DATAMATION 1992 Salary Survey

Whether these rollbacks take the form of larger monthly payroll deductions, higher deductibles or more stringent restrictions, reduced health care benefits are taking an unwelcome bite out of a paycheck that will probably not increase that much this year in any case.

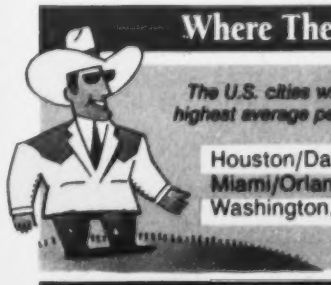
Some major companies are fine-tuning their health-care coverage even as they plead to government officials to institute national health insurance. The Gillette Co. recently adopted a plan to require employees to pay for retirement health care insurance, according to an official at the Boston-based shaving-products company. Ciba Corning's employees saw a small increase in their premiums this year, as did Brown & Root's.

Corporate training is expanding at many companies, due in part to the rapid appearance and growing importance of new technologies like object-oriented programming and client/server architecture. "Our training budget is up 20% a year for past two or three years," says Al Risdorfer, director of human resource planning and development at Computer Sciences Corp.'s Waltham, Mass. office. He explains that the company is making a major investment to upgrade its staff's management and technology skills.

Some enlightened companies take the point of view that retraining existing personnel in the new technologies like distributed processing is more cost-effective. "We eschewed the notion of bringing in paid mercenaries and running the risk of creating a schism between haves and have-nots," says Charles Schwab's CIO Mark Barmann. "In most cases, we're going with our own people, and we're willing to shoulder the additional expense of their retooling."

Technical awards can be a compensation-based mechanism to encourage innovative thinking and

(Continued on page 44)



Where The Grass Is Lushest...

The U.S. cities where IS employees will enjoy the highest average percentage pay increases this year:

Houston/Dallas/Ft. Worth	5.99%
Miami/Orlando/Tampa	5.96%
Washington, D.C./Baltimore	5.86%

And Where The Ground Is Barest

Los Angeles	4.70%
Boston	5.12%
New York City	5.23%

Source: DATAMATION 1992 Salary Survey

Salary Averages By Location (in $)

Title	Weighted Average	Boston	New York City	Wash. D.C./ Baltimore	Chicago	Dallas/Ft. Worth Houston
IS MANAGEMENT						
CIO/VP	$117,082	115,624	128,979	102,804	120,000	133,205
Director	80,925	79,081	88,695	79,202	82,972	77,031
Manager/Supervisor	57,113	55,000	69,062	57,419	57,102	54,701
Data Center Manager	59,289	56,625	77,159	57,090	60,614	59,239
END-USER SUPPORT						
Manager End User Computing	52,677	50,769	53,939	55,000	50,500	57,750
Information Center Manager	54,285	61,176	68,636	49,500	53,478	52,250
PC Specialist/Support	37,867	39,531	44,111	38,363	36,698	35,900
LAN Manager	46,716	54,250	53,181	45,416	45,769	45,500
WP Supervisor	36,323	31,000	40,714	39,062	34,375	35,000
SYSTEMS ANALYSIS/PROGRAMMING						
Manager Systems Analysis and Programming	62,902	66,176	69,777	60,612	63,586	63,690
Senior Systems Analyst and Programmer	51,201	51,190	57,441	51,428	48,968	50,338
Systems Analyst and Programmer	42,515	45,750	47,428	41,636	41,551	42,627
Intermediate Analyst and Programmer	37,355	42,884	44,137	36,250	36,341	37,857
Junior Analyst and Programmer	30,218	28,750	41,666	27,272	28,871	31,111
APPLICATION/OPERATING SYSTEMS PROGRAMMING						
Manager Applications/Operating Systems Prog.	65,778	64,807	83,593	61,666	69,193	62,258
Senior Applications/Operating Systems Prog.	53,491	51,400	68,392	51,097	52,297	49,324
Applications/Operating Systems Prog.	43,965	51,521	54,230	41,785	40,857	41,800
Intermediate Applications/Operating Systems Prog.	38,382	35,384	56,153	36,029	38,333	36,785
Junior Applications/Operating Systems Programmer	30,136	33,181	49,090	28,750	22,857	31,666
DATA COM/TELECOM/CONNECTIVITY						
Network Manager (LAN - WAN)	58,062	56,842	69,464	57,794	62,826	48,823
Telecommunications Manager	58,457	55,666	65,555	61,093	69,722	58,000
Communications Specialist	42,662	39,062	48,541	42,027	41,250	42,647
DATABASE						
Database Manager/Administrator	59,731	52,586	68,225	56,739	56,612	51,785
Database Analyst	47,643	43,529	61,521	44,852	47,045	45,357
Microcomputer/Workstation Manager	44,141	53,333	45,357	44,772	51,000	40,000

Salary Averages By Segment (in $)

Title	Weighted Average	Manufacturing (Consumer)	Manufacturing (Industrial)	Banking	Financial Services
IS MANAGEMENT					
CIO/VP	$117,082	132,962	106,785	141,136	134,456
Director	80,925	83,333	81,585	107,631	85,000
Manager/Supervisor	57,113	59,285	55,769	70,192	62,500
Data Center Manager	59,289	56,666	53,593	80,681	68,953
END-USER SUPPORT					
Manager End User Computing	52,677	51,785	55,882	70,454	60,535
Information Center Manager	54,285	41,818	49,000	62,500	62,954
PC Specialist/Support	37,867	37,600	37,580	40,000	39,285
LAN Manager	46,716	41,250	45,294	56,818	53,166
WP Supervisor	36,323	40,000	35,000	37,500	42,727
SYSTEMS ANALYSIS/PROGRAMMING					
Manager Systems Analysis and Programming	62,902	66,250	57,068	78,958	64,743
Senior Systems Analyst and Programmer	51,201	46,428	49,021	60,869	52,800
Systems Analyst and Programmer	42,515	41,216	41,714	48,157	43,837
Intermediate Analyst and Programmer	37,355	36,666	38,125	38,928	42,432
Junior Analyst and Programmer	30,218	27,307	27,812	28,000	37,173
APPLICATION/OPERATING SYSTEMS PROGRAMMING					
Manager Applications/Operating Systems Prog.	65,778	64,166	65,238	84,117	80,000
Senior Applications/Operating Systems Prog.	53,491	50,312	54,000	70,357	64,333
Applications/Operating Systems Prog.	43,965	40,882	42,857	55,416	51,600
Intermediate Applications/Operating Systems Prog.	38,382	36,250	38,846	47,500	45,294
Junior Applications/Operating Systems Programmer	30,136	22,500	28,000	35,714	41,111
DATA COM/TELECOM/CONNECTIVITY					
Network Manager (LAN - WAN)	58,062	58,333	55,357	81,000	67,500
Telecommunications Manager	58,457	52,000	59,285	76,153	65,217
Communications Specialist	42,662	40,000	42,142	51,388	42,400
DATABASE					
Database Manager/Administrator	59,731	56,764	60,555	75,416	71,200
Database Analyst	47,643	43,461	50,555	60,000	53,043
Microcomputer/Workstation Manager	44,141	40,000	40,000	49,000	55,454

Salary Averages By Company Revenue

San Francisco	Los Angeles	Tampa/Orlando/ Miami	Weighted Average	1-249	250-499	500-4,999	5,000-19,999	20,000+
				($ Millions)				
106,060	115,000	113,098	$117,082	92,840	107,656	115,045	129,302	199,242
86,555	87,386	75,377	80,925	70,031	73,492	80,312	92,627	100,999
58,939	62,264	51,198	57,113	52,042	55,434	57,716	62,288	69,230
55,394	62,121	51,486	59,289	47,168	58,255	60,661	66,754	74,342
53,333	55,238	48,750	52,677	48,474	44,821	54,166	54,875	62,800
55,833	50,357	48,947	54,285	50,000	48,333	54,166	58,333	59,791
42,763	39,210	33,350	37,867	36,343	36,538	38,159	41,914	41,500
49,807	47,500	39,711	46,716	42,413	44,615	47,500	51,818	49,642
37,000	31,000	35,000	36,323	37,000	38,125	35,781	34,750	38,000
67,580	62,258	56,250	62,902	61,804	59,838	60,461	67,454	69,210
58,431	58,214	43,990	51,201	50,387	52,129	50,093	52,177	55,384
46,071	43,857	38,225	42,515	42,519	40,918	42,187	43,000	44,594
37,096	38,043	32,627	37,355	36,730	36,000	36,648	39,100	39,117
30,769	31,666	26,562	30,218	29,897	27,400	30,506	32,750	29,444
67,037	65,625	57,800	65,778	57,543	62,678	64,722	74,300	74,242
59,807	56,250	48,103	53,491	50,373	51,785	51,161	58,076	58,181
47,105	45,714	38,163	43,965	44,310	40,681	40,937	47,291	47,166
38,235	41,000	34,375	38,382	34,428	30,625	39,666	40,810	42,777
29,500	30,625	25,000	30,136	27,884	26,071	30,555	36,190	31,250
55,789	64,285	50,405	58,062	46,976	51,470	57,388	63,088	75,172
53,571	70,000	47,333	58,457	52,333	52,000	57,222	65,945	64,464
49,821	45,250	36,739	42,662	40,789	46,739	41,089	43,139	44,516
62,884	61,338	49,687	59,731	51,642	56,538	55,813	61,162	64,666
46,250	53,928	42,000	47,643	42,432	43,529	49,732	47,073	53,043
43,461	45,000	36,052	44,141	40,000	45,769	44,629	43,571	46,176

DP Services	Distribution (Wholesale/Retail)	Government	Medical/ Legal	Transportation	Education	Construction	Other
112,638	116,176	89,761	103,636	131,250	86,041	106,666	130,241
78,571	86,428	75,548	77,083	88,387	63,437	70,555	83,483
56,935	53,076	55,864	47,972	61,500	49,358	54,444	5,969
56,000	56,279	57,089	54,375	70,714	45,689	49,285	56,388
52,916	42,750	53,260	50,937	63,076	45,217	40,000	49,893
56,111	62,000	53,690	54,000	63,666	40,937	40,000	50,208
42,173	38,906	38,400	36,379	41,956	34,242	45,833	35,125
45,357	49,375	46,759	42,647	48,823	40,000	40,000	45,714
31,428	35,000	35,862	28,000	44,285	37,857	32,500	34,545
62,307	60,312	60,258	58,750	66,000	53,448	63,750	65,491
50,416	48,522	51,666	45,172	50,645	44,705	43,000	58,714
41,500	43,690	42,671	40,714	44,687	36,896	40,000	42,898
33,888	33,076	34,905	37,500	39,423	34,000	35,000	40,000
29,285	25,652	29,333	31,923	34,285	29,615	32,500	28,947
65,714	62,631	61,734	57,187	70,714	53,125	62,500	63,452
53,000	50,833	51,481	48,611	56,458	44,772	52,857	49,777
43,750	40,833	41,836	41,363	43,913	34,166	40,000	47,999
38,636	38,500	35,657	40,000	43,750	31,428	25,000	35,000
26,875	23,500	28,888	35,000	36,785	27,142	32,500	29,000
55,769	57,083	57,093	49,333	60,333	49,473	40,000	58,958
51,538	63,214	55,000	61,250	61,111	47,812	51,250	57,511
40,000	43,000	40,937	38,636	45,000	35,263	47,500	46,029
54,473	52,187	53,584	53,333	60,217	46,428	47,500	52,272
44,090	45,000	46,666	48,571	47,857	40,000	40,000	43,620
41,875	49,000	45,357	36,250	53,500	32,500	40,000	36,250

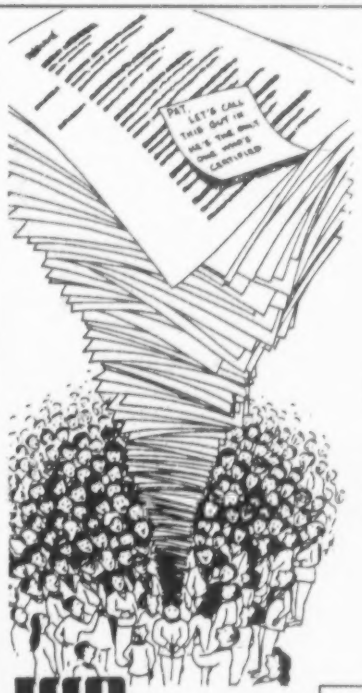
the use of new technologies. CSC's program, now in its fourth year, recognizes individuals who have made an outstanding technical breakthrough in the last 12 months, according to Pete Gross, vice president for CSC's Corporate Technology Center in Falls Church, Va. Five to eight staffers receive $5,000 (tax-free), and 12 finalists receive $1,000 from a pool of 60 or 70 nominees out of the firm's 18,000 programmers, analysts and other IS staff members. Recent $5,000 winners included a developer of a large software system built for the National Aeronautics and Space Administration that contained 85% reusable code.

Less encouraging is the small number of companies that offer help to parents needing day care for their children. Only 9.6% of those who filled out the DATAMATION survey said that their companies offered on-site child care facilities; 11% provide some form of child care reimbursement. A 1991 study of U.S. companies by the Jersey City, N.J.-based management consulting firm Hay Group found that only 16% provided employer-funded child care. The study projects that that number will grow, however, as more companies adjust their benefit programs to respond to their employees' family-based needs. Although Brown & Root increased its employees' health insurance costs slightly this year, it opened a new day-care center for 109 employee children, as well as a well-equipped fitness center. Both facilities have been a "big employee draw and help keep them here," says recruiter Curd. In the ongoing push and pull of employee benefits, watch for continued pressure for additional corporate support of day-care options. ■

Kate Colborn is a Center Harbor, N.H.-based writer who covers technical career issues.

Methodology

The data for the DATAMATION Salary Survey are based on a questionnaire sent in May by Cahners Publishing Co.'s Research unit to more than 8,600 IS managers who subscribe to DATAMATION. More than 900 recipients from 12 user-sectors completed the four-page questionnaire, which included 25 job titles and 22 types of benefits. For more information about the survey, contact Cahners Research at (617)-964-3030.



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Born To Buy Computers

DATAMATION's Information Systems Performance Indicator (ISPI) continues its 1992 trend upward, ever upward. New orders received by U.S.-based information system suppliers in March jumped to $10.5 billion, up 17.8% from the previous year. It was the third-highest monthly total ever recorded.

In April, orders climbed 11.7% higher than they were in the same month of the previous year. This boost, along with the gain in average weekly hours for computer industry employees, nudged the ISPI to 96.54 in April. Based on information available at press time, we estimate the indicator will reach 103.5 this month.

Over the remainder of 1992, increases in new orders will continue to feed growth in the ISPI, as demand for computers, peripherals and communication equipment strengthens.

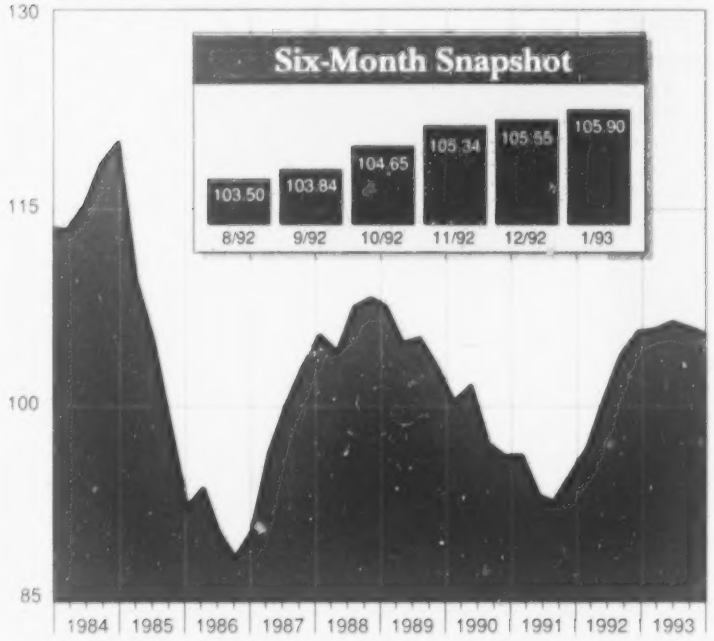
In the first quarter of 1992, U.S. business purchases of computers and peripherals reached an annualized $41.3 billion—a gain of 3.5% over the previous quarter's level and 12.9% higher than the same period of the previous year. On top of that, U.S. companies bought $63.4 billion worth of communication equipment, on an annualized basis, in the first quarter of '92.

Cahners Economics's business surveys on capital spending plans confirm the growing appetite for new equipment. In November of last year, the capital-spending index seemed frozen at 55.4. But, by April 1992, that index had steadily edged up to 59.3. Since purchases of computers, peripherals and communication equipment account for 26 cents of every dollar spent on capital equipment, the IS industry can expect continued growth in demand for equipment this year. ■

By Madeline Fruechi, Cahners Economics. For more information on Cahners Economics's forecasting services, including seminars, newsletters, and database diskettes, contact Dan Buchan at (617) 630-2105.

The IS Performance Indicator

Increases in new orders will continue to feed growth as demand strengthens.



*Shaded area denotes forecast

	Last Month	Prev. Month	% Change	Year Ago	% Change
Information-Processing Equipment					
Shipments (SA, $ billions, April)	10.45	10.49	-0.4	9.36	11.6
New Orders (SA, $ billions, April)	9.96	10.50	-5.2	8.92	11.7
Unfilled Orders (SA, $ billions, April)	24.77	25.26	-1.9	28.08	-11.8
Inventory (SA, $ billions, April)	14.94	14.96	-0.1	16.16	-7.5
Computer Production Workers					
Employment (NSA, thousands, April)	245.2	246.0	-0.3	267.2	-8.2
Average Weekly Hours (monthly avg., April)	41.4	42.0	-1.4	39.8	4.0
Stock Index (May)					
S&P's Computer Systems Stock Price Index	155.1	149.6	3.7	172.55	-10.1
Contracts & Orders (March)					
New Plant & Equipment (SA, $ billions)	37.0	35.4	4.6	35.94	3.0

SA = Seasonally Adjusted
NSA = Not Seasonally Adjusted

Source: U.S. Commerce Dept., Standard & Poor's
Forecasts: Cahners Economics

Source: DATAMATION, Cahners Economics

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